

Using Member Reports and Tools That Measure Impact

- Objective:** This exercise illustrates how members can use monthly reporting forms and tools to measure the impact of their service and to track progress relative to performance measures set at the start of the service year
- Materials:**
- Flip chart paper and markers
 - Copies of monthly reporting forms
 - Copies of monthly report data sheets for participants
- Instructions**
1. Choose one of two attached examples of service to give to participants. Sample 1, “Housing Counseling: Homeownership” is related to needs and services. Sample 2, “Increase Awareness of Resources/Services” relates to community strengthening.
 2. Break participants into small groups of two or three people. Give each group one of the attached examples of service, and tell them their job is to provide a sample monthly report based on the activities described in the handout.
 3. While the activity is flexible, you should have already determined the numbers related to outputs and outcomes. This activity asks members to use information intentionally designed to be tricky. You will also need to point out instances where “double counting” can occur. For the written part of the reports, encourage members to provide detailed and useful information, not fluff.
- Duration:** 30 – 45 minutes

Sample 1: Housing Counseling – Homeownership

Members:

Using the following information and data and the <<insert name of program's monthly reporting form>>, create a concise monthly report.

February 1: 20 people attended a housing counseling workshop. 15 people completed the housing counseling survey. 10 people indicated they were more knowledgeable about the process to become a homeowner. 10 people indicated they were knowledgeable about the resources available for first time homebuyers.

February 1-10: Provided one-on-one credit counseling to 25 people.

February 15-20: 10 people completed the closing process and took possession of their homes.

February 20-28: Provided assistance to 7 people with their applications for down payment assistance.

February 21: Provided one-to-one housing counseling to 10 people who all completed surveys. 9 said they were more knowledgeable about the process to become a homeowner. 8 said they were more knowledgeable about the resources available for first-time homebuyers.

MONTHLY REPORTING FORM

Member's Name: _____

Reporting Period: _____

A Monthly report of your service activities is required. The report:

- (a) Will consist of three sections: (a) outputs, (b) outcomes, and (c) narrative
- (b) Should be reviewed by your supervisor prior to submission to the local Program Officer
- (c) Is submitted via e-mail to the local Program Officer on a monthly basis
- (d) Covers a period which ends on the last day of a month

OUTPUTS: How many people did you serve during this reporting period? Only include those individuals/clients who are new this month. Do not include clients who were served in a previous month. If there was no new activity, it is acceptable to enter "0."

- _____ Number of homeownership education workshops you taught
- _____ Number of people who received homeownership counseling/education from you
- _____ Number of people to whom you provided credit counseling
- _____ Number of people you helped with down payment assistance applications
- _____ Number of people you referred to credit counseling agencies
- _____ Number of people who received mortgage approval
- _____ Number of people who received marketing materials

Other: _____

OUTCOMES: It is required that you attach the actual surveys used to measure the impact of your service activities. If you did not use a survey, please describe how the numbers were determined (for example, one-on-one interviews, CDC designed surveys, focus groups) in the narrative section. If you did not complete surveys or another measurement tool, you should not report outcomes.

- _____ Number of people you counseled who indicated they are more knowledgeable about the process of being a homeowner
- _____ Number of people you counseled who indicated they are more knowledgeable about resources available to purchase a home
- _____ Number of people who purchased a home

Other: _____

NARRATIVE: Provide a narrative report which includes:

- (1) A description of the service activities you undertook this month (for example, homeownership counseling education, referrals to credit counseling agencies, one-on-one credit counseling, help with down payment assistance programs, marketing/ outreach for homeownership programs)
- (2) A description of any successes achieved this reporting period
- (3) A description of any challenges encountered and steps taken to address the challenges
- (4) If you did not attach surveys to document the outcomes section, please describe how the outcomes were derived

Sample 2: Increase Awareness of Resources/ Services

Members:

Using the following information and data, create a concise monthly report.

Assume that the member conducted all of the information sessions, developed the flyers, and had volunteers distribute them.

February 3: 25 people came to an information session on the CDC's summer youth programs. 1 flyer was created and distributed to the 50 households at the Sunshine Homes Development. 23 people returned surveys. 20 people indicated that they received information of value, while 10 felt better able to access the CDC's summer youth programs.

February 6: 12 people came to an information session on the CDC's after school program. 1 flyer was created and distributed to the 50 households at the Sunshine Homes Development and 50 homes at the Happy Houses Development. 12 people returned the surveys and felt that they received information of value. 10 felt better able to access the CDC's after school program.

February 14: Member went to a City Council meeting with 6 community residents. The goal was to have the residents talk about the cuts the City has made to the CDC's budget and the resulting impact that the CDC will have to offer fewer programs over the summer.

February 16: The third in a series of five workshops for women was held. 5 of the 7 women enrolled attended due to the freak snow storm in West Palm Beach. The workshop focused on resume writing and Internet job search skills. All five women felt that they learned information of value and have a better understanding of how to find a job on the internet.

February 28: The CDC got a \$20,000 grant from the City to offer a summer youth leadership program for 10. Each participant will receive a stipend of \$500 for their work over the summer.

MONTHLY REPORTING FORM SAMPLE

Member's Name: _____

Reporting Period: _____

A monthly report of your service activities is required. The report:

- (a) Will consist of three sections: (a) outputs, (b) outcomes, and (c) narrative
- (b) Should be reviewed by your supervisor prior to submission to the local Program Officer
- (c) Is submitted via e-mail to the local Program Officer on a monthly basis
- (d) Covers a period which ends on the last day of a month

OUTPUTS: How many people did you serve during this reporting period? Only include those individuals/ clients who are new this month. Do not include clients who were served in a previous month. If there was no new activity, it is acceptable to enter "0."

- _____ Number of homeownership education workshops you taught
- _____ Number of people who received homeownership counseling/education from you
- _____ Number of people to whom you provided credit counseling
- _____ Number of people you helped with down payment assistance applications
- _____ Number of people you referred to credit counseling agencies
- _____ Number of people who received mortgage approval
- _____ Number of people who received marketing materials
- Other: _____

OUTCOMES: It is required that you attach the actual surveys used to measure the impact of your service activities. If you did not use a survey, please describe how the numbers were determined (for example, one-on-one interviews, CDC designed surveys, focus groups) in the narrative section. If you did not complete surveys or another measurement tool, you should not report outcomes.

- _____ Number of people you counseled who indicated they are more knowledgeable about the process of being a homeowner
- _____ Number of people you counseled who indicated they are more knowledgeable about resources available to purchase a home
- _____ Number of people who purchased a home
- Other: _____

NARRATIVE: Provide a narrative report which includes:

- (1) A description of the service activities you undertook this month (for example, homeownership counseling education, referrals to credit counseling agencies, one-on-one credit counseling, help with down payment assistance programs, marketing/outreach for homeownership programs).
- (2) A description of any successes achieved this reporting period.
- (3) A description of any challenges encountered and steps taken to address the challenges.
- (4) If you did not attach surveys to document the outcomes section, please describe how the outcomes were derived

Narrative

For the month of February I was involved in a number of activities related to housing counseling. In order to attract people to the large group housing counseling workshop and also have clients available who were interested in receiving one-on-one counseling services, I sent out marketing materials about the organization's services related to helping people become first time homebuyers. I created brochures and flyers that were sent to 100 people in our database.

I think the marketing efforts were successful since 20 people attended the large group workshop and 10 others made and kept appointments for one on one counseling. I'm really pleased that 10 people were able to close on their homes and move in this month.

It was challenging providing credit counseling to so many people – especially since most of them didn't seem to realize their credit was in such bad shape. I think for the next time – I'll pull credit reports early and have amore experienced staff person sit with me to help me explain issues more thoroughly. I also would have liked a larger turnout for the large group workshop. Next month, in addition to sending out materials – I'll make phone calls and follow-up with people to see if we can have a larger number of participants for the workshop.

I did not attach surveys to this report, but I did conduct a straw poll at the group housing counseling workshop. The summary of the results of that poll are attached. I asked each of the 10 people who closed on their homes the questions related to increased knowledge about the process of becoming a homeowner and being more knowledgeable about the resources available to purchase a home. Their responses are also included in the summary that is attached to the report.